



BOARD OF EQUALIZATION

**CUSTOMER SERVICE AND ADMINISTRATIVE
EFFICIENCY COMMITTEE MEETING MINUTES**HONORABLE BILL LEONARD, COMMITTEE CHAIR
450 N STREET, SACRAMENTO

JANUARY 26, 2010, 9:30 A.M.

ACTION ITEMS & STATUS REPORT ITEMS**Agenda Item No: 1****Title:** Taxpayers' Rights Advocate's 2008-09 Property and Business Taxes Annual Report**Issue/Topic:**

Presentation of Annual Report highlighting Taxpayers' Rights Advocate Office accomplishments, involvement in projects, current issues, and examples of services provided.

Committee Discussion:

Committee Chair Bill Leonard opened the Committee meeting by introducing the first agenda item and asked staff to give an update of the Taxpayers' Rights Advocate's 2008-09 Property and Business Taxes Annual Report.

Ms. Anita Gore, Deputy Director, External Affairs Department, introduced herself and Mr. Todd Gilman, Chief, Taxpayers' Rights Advocate's Office (TRA). Mr. Gilman stated he was pleased to present the Taxpayers' Rights Advocate's 2008-09 Property and Business Taxes Annual Report.

Mr. Gilman stated that this year's report:

- Highlights accomplishments of the office during the past year,
- Describes TRA involvement in important new projects to assist taxpayers,
- Identifies current issues TRA is working to resolve, and
- Contains examples of cases illustrating the services TRA Office provides.

Mr. Gilman thanked staff in the TRA Office for their dedication and unwavering commitment to uphold and protect taxpayers' rights. He also thanked staff from the Sales and Use Tax Department, Property and Special Tax Department, and Legal Department for assisting and developing this year's report.

Mr. Gilman concluded by asking if there were any questions.

Committee Chair Bill Leonard commended Mr. Gilman and his staff for their creative ideas to assist taxpayers with meeting their tax and fee obligations.

Committee Action/Recommendation/Direction:

None

Committee Materials:

Taxpayers' Rights Advocate's 2008-09 Property and Business Taxes Annual Report Memorandum.

Taxpayers' Rights Advocate's 2008-09 Property and Business Taxes Annual Report.

Agenda Item No: 2

Title: Status Report Regarding Online Educational and Learning Products and Related Marketing Plan

Issue/Topic:

Update regarding online educational and learning products and marketing plan.

Committee Discussion:

Committee Chair Bill Leonard introduced the second agenda item and asked staff to give a status report regarding online educational and learning products and marketing plan.

Ms. Gore introduced Ms. Kari Hammond, Manager, Outreach Services Division (OSD), and then gave a report regarding the online educational and learning products and related marketing plan.

Ms. Gore reported that staff has completed the task of making all materials and classes available online. She announced that the information will be available online after the meeting today at <http://www.boe.ca.gov/info/meetingsseminars.htm>.

Ms. Gore introduced a short demonstration of the new online seminars web pages.

Ms. Gore also reported that the Board of Equalization (BOE) has begun the process of translating the Basic Sales and Use Tax PowerPoint presentation and script into four languages; Spanish, Chinese, Korean, and Vietnamese. She stated that the translated presentations should be completed by Summer 2010. She also stated that as resources become available that the BOE will work to translate other components of the online educational products.

Ms. Gore stated staff continues to market this new product to BOE taxpayers. She reported that BOE has issued one news release, has an additional press release prepared, and created a 1/3 sheet flyer for handout and mailing. She commented that the 1/3 sheet flyer is included in all new registration packets, and with materials for Speaker's Bureau presentations.

Ms. Gore also stated that BOE will continue to work with partners and take advantage of every opportunity to get the word out to taxpayers. She commented that staff is creating a facilitator's guide that will be provided to community partners to assist them with using the BOE online educational products at their forums.

Ms. Gore reported that BOE will continue to use ListServ announcements and provide information to permit holders who have email addresses on file with the BOE. She stated that according to Technology Services Division (TSD), there are approximately half a million taxpayers who have an email address on record with the BOE, and that the BOE is working on ways to notify them of relevant updates.

Ms. Gore reported outreach efforts have been successful. She commented that there have been over 9,000 webpage views this month for the online educational products.

Ms. Gore concluded the presentation and asked if there were any questions.

Board Member Betty Yee applauded staff on the progress being made with the online seminars, and commented that the new online products will help to reach a broader audience, in addition to the in-person seminars.

Committee Chair Bill Leonard encouraged Board Members to put links to the online seminar on their websites and to include the links in their outreach materials given at in-person seminars.

Mr. Leonard requested staff create a Frequently Asked Questions webpage to address the commonly asked questions submitted through the online seminars' email boxes. He also suggested that staff continue to update the online seminar presentations to address any commonly asked questions.

Mr. Leonard asked if the other 400,000 taxpayers have email addresses that the BOE has not yet obtained.

Ms. Gore responded that she was not sure if that analysis has been done. She stated that BOE obtains email information from all new permit registrants.

Mr. Leonard suggested that the BOE request taxpayers' email addresses in any mass mailing correspondence sent to taxpayers from the BOE. He stated that these mailings should include a statement informing the taxpayers of the benefits of email correspondence, for example, quicker notification of issues or information.

Mr. Leonard thanked staff for their efforts.

Committee Chair Bill Leonard adjourned the Committee meeting.

Committee Action/Recommendation/Direction:

None

Committee Materials:

Memo to Board Member - Status Report Regarding Online Educational and Learning Products and Related Marketing Plan

Status Report Regarding Online Educational and Learning Products and Related Marketing Plan

Approved: /s/ Bill Leonard
Honorable Bill Leonard, Committee Chair

/s/ Ramon J. Hirsig
Ramon J. Hirsig, Executive Director

BOARD APPROVED

At the January 27, 2010 Board Meeting
/s/ Diane Olson
Diane Olson, Chief
Board Proceedings Division